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Transmitted herewith for filing under 35 U.S.C. 111 and 37 C.F.R. 1.53 is the patent application of:

For: SYSTEM AND METHOD FOR USING A WORKSPACE DATA MANAGER TO ACCESS, MANIPULATE AND SYNCHRONIZE NETWORK DATA

☐ Certificate of Mailing with Express Mail Mailing Label No. **EM320545362US**

☒ 9 sheets of drawings.

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☐ Information Disclosure Statement

☐ Preliminary Amendment

☒ 1 _____ Verified Statement(s) to Establish Small Entity Status Under 37 C.F.R. 1.9 and 1.27.

☐ Other:

Variable	Mean	SD	Min	Max
Age	34.5	10.5	20	55
Gender	1.0	0.0	0	1
Marital status	1.0	0.0	0	1
Education	12.5	1.5	9	16
Income	1.5	0.5	1	2
Occupation	1.0	0.0	0	1
Health status	1.0	0.0	0	1
Smoking status	1.0	0.0	0	1
Alcohol consumption	1.0	0.0	0	1
Exercise frequency	1.0	0.0	0	1
Stress level	1.0	0.0	0	1
Life satisfaction	1.0	0.0	0	1
Overall health	1.0	0.0	0	1
Physical health	1.0	0.0	0	1
Mental health	1.0	0.0	0	1
Social health	1.0	0.0	0	1
Emotional health	1.0	0.0	0	1
Behavioral health	1.0	0.0	0	1
Environmental health	1.0	0.0	0	1
Healthcare access	1.0	0.0	0	1
Health insurance	1.0	0.0	0	1
Healthcare quality	1.0	0.0	0	1
Healthcare cost	1.0	0.0	0	1
Healthcare satisfaction	1.0	0.0	0	1
Healthcare utilization	1.0	0.0	0	1
Healthcare access	1.0	0.0	0	1
Health insurance	1.0	0.0	0	1
Healthcare quality	1.0	0.0	0	1
Healthcare cost	1.0	0.0	0	1
Healthcare satisfaction	1.0	0.0	0	1
Healthcare utilization	1.0	0.0	0	1

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Man A. Sahal
Signature

Graham & James LLP
600 Hansen Way
Palo Alto, CA 94304-1043
(650) 856-6500

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DANIEL J. MENDEZ

SYSTEM AND METHOD FOR USING A WORKSPACE DATA MANAGER
TO ACCESS, MANIPULATE AND SYNCHRONIZE NETWORK DATA

Please direct communications to:

Express Mail Number **EM320545362US**

PRIORITY REFERENCES

395-270-71

by inventor Mark D. Riggins; and U.S. patent application serial number 08/903,118, entitled "System and Method for Globally and Securely Accessing Unified Information in a Computer Network," filed on July 30, 1997, by inventors Daniel J. Mendez, et al.

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BACKGROUND OF THE INVENTION

1. Field of the Invention

This invention relates generally to computer networks, and more particularly provides a system and method for using a workspace data manager to access network data.

2. Description of the Background Art

Data accessibility and consistency are significant concerns for computer users. For example, when a roaming user, i.e., a user who travels to a remote location, needs to review or manipulate data such as an e-mail or prepared document, the roaming user must either carry the data to the remote location or access a workstation remotely. Maintaining a true copy of a database is a cumbersome process. Accordingly, system designers have developed an array of techniques for connecting a remote terminal across a computer network to the workstation storing the data.

To guarantee readability of the downloaded data, the user must carry a laptop computer containing all the applications needed to present and enable manipulation of the downloaded data, or find a network-connected computer that contains the needed application programs. Further, when maintaining multiple
5 independently modifiable copies of particular data, a user risks using an outdated version. By the time the user notices an inconsistency, interparty miscommunication or data loss may already have resulted. The user must then spend more time reconciling the inconsistent versions.

The problems of data accessibility and inconsistency are exacerbated when
10 multiple copies of a document are maintained at different network locations. For example, due to network security systems such as conventional firewall technology, a user may have access only to a particular one of these network locations. Without access to the other sites, the user cannot confirm that the version on the accessible site is the most recent draft.

SUMMARY OF THE INVENTION

The present invention provides a system for using a workspace data manager to access, manipulate and synchronize workspace data. A workspace data manager may include a Personal Information Manager (PIM), a word processing program, a spreadsheet program, or any application program that enables manipulation of workspace data. Workspace data includes at least one workspace element, such as an e-mail, a day of calendar data, a word document, a bookmark, a sheet of spreadsheet data, or a portion thereof. Workspace data may include e-mails, calendar data, word documents, bookmarks, spreadsheet data, or portions thereof.

The system includes a communications module for downloading workspace data from a remote site, an application program interface coupled to the communications module for communicating with a workspace data manager to enable manipulation of the downloaded workspace data and thereby create manipulated data, and a general synchronization module coupled to the communications module for synchronizing the manipulated data with the workspace data stored at the remote site. An instantiator requests the workspace data manager to provide an interface for enabling manipulation of the downloaded workspace data. The workspace data manager may create another instance of the interface or may provide access to its only interface to enable manipulation of the data. A data reader translates the downloaded workspace data from the format

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5 compromising the local data.

10 left on the local client for unprivileged users to review. Using the technology

BRIEF DESCRIPTION OF THE DRAWINGS

FIG. 1 is a block diagram illustrating a network system, in accordance with the present invention;

FIG. 2 is a block diagram illustrating details of the home or work client of
5 FIG. 1;

FIG. 3 is a block diagram illustrating details of the global server of FIG. 1;

FIG. 4 is a block diagram illustrating details of the remote client of FIG. 1;

FIG. 5 is a block diagram illustrating details of an assistant of FIG. 1;

FIG. 6 illustrates a personal information manager interface;

10 FIG. 7 illustrates a second personal information manager interface
incorporating an assistant interface;

FIG. 8 is a flowchart illustrating a method of accessing network data from a remote site in accordance with the present invention; and

FIG. 9 is a flowchart illustrating a method of synchronizing network data
15 from a remote site.

DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENT

FIG. 1 is a block diagram illustrating a network system 100 for using a workspace data manager to access, manipulate and synchronize workspace data in accordance with the present invention. A workspace data manager may include a Personal Information Manager (PIM), a word processing program, a spreadsheet program, or any application program that enables manipulation of workspace data. Workspace data includes at least one workspace element, such as an e-mail, a day of calendar data, a word document, a bookmark, a sheet of spreadsheet data, or a portion thereof. Workspace data may include e-mails, calendar data, word documents, bookmarks, spreadsheet data, or portions thereof. Although the network system 100 is described with reference to PIM's, one skilled in the art will recognize that the system 100 will work with any workspace data manager.

Network system 100 includes a global server 105 coupled via a computer network 125 to a work client 110, to a home client 115 and to a remote client 120. The global server 105 includes a synchronization agent 130 and workspace data 135. The work client 110 includes a base system 140 and workspace data 145. The home client 115 includes a base system 150 and workspace data 155.

Each of the base system 140 and the base system 150 cooperate with the synchronization agent 130 to synchronize workspace data 135, workspace data 145 and workspace data 155 between the work client 110, the home client 115 and the global server 105. Synchronization of workspace data 135, 145 and 155 is

described in detail in the patent applications incorporated by reference above.

However, a brief example of synchronization is provided for completeness.

First, the base system 140 on the work client 110 site negotiates a secure communications channel via any firewalls with the synchronization agent 130, for example, using Secure Sockets Layer (SSL) technology. The base systems 140 examines version information and if necessary the content of a workspace to determine the most updated version. The most updated version is then stored at the client 110 site and at the global server 105 site. The base system 140 repeats these operations for all workspace elements selected for synchronization. Second, the base system 150 on the home client 115 site uses similar steps to synchronize its workspace data 155 with the workspace data 135 on the global server 105 site. Accordingly, the most updated versions of the workspace data 135, 140 and 145 are stored at all three sites.

Each of the work client 110, the home client 115 and the remote client 120 includes a respective workspace data manager, e.g., a Personal Information Manager (PIM) 160, 165 and 170 such as Outlook™ 98 developed by Microsoft Corporation, Organizer 97 developed by Lotus Development Corporation or Sidekick 98 developed by Starfish Software. Each PIM 160, 165 and 170 includes an assistant 175, 180 and 185 that adds data access and synchronization functions to the PIM 160, 165 and 170. Accordingly, a user can transparently use an assistant 175, 180 or 185 via a PIM 160, 165 or 170 to access workspace data 135

from the global server 105, to present and enable manipulation of downloaded workspace data 135, and to synchronize manipulated downloaded data 135 with the workspace data 135 stored on the global server 105. Components and operations of the assistant 175, 180 or 185 are described in detail with reference to

5 FIGs. 7-9.

FIG. 2 is a block diagram illustrating details of a data-synchronizing client 200, in a generic embodiment which exemplifies each of the work client 110 and the home client 115. The client 200 includes a processor 205, such as an Intel Pentium® microprocessor or a Motorola Power PC® microprocessor, coupled to a

10 communications channel 210. The client 200 further includes an input device 215 such as a keyboard and mouse, an output device 220 such as a Cathode Ray Tube (CRT) display, data storage 230 such as a magnetic disk, and internal storage 235 such as Random-Access Memory (RAM), each coupled to the communications channel 210. A communications interface 225 couples the communications

15 channel 210 to the computer network 125.

An operating system 240 controls processing by processor 205, and is typically stored in data storage 230 and loaded into internal storage 235 (as illustrated) for execution. A base system 250, which cooperates with the synchronization agent 130 for synchronizing local workspace data 245 with

20 workspace data 135, also may be stored in data storage 230 and loaded into internal storage 235 (as illustrated) for execution by processor 205. The local

workspace data 245 exemplifies workspace data 145 or workspace data 150, and may be stored in data storage 230.

A PIM 255 includes an assistant 260, which enables a user to download workspace data 135 from the global server 105, and to use the PIM 255 for displaying and manipulating the workspace data 135. The assistant 260 further enables the PIM 255 to synchronize the manipulated data 135 with the workspace data 135 on the global server 105. The PIM 255 exemplifies each of the PIM 160 on the work client 110 and the PIM 165 on the home client 115. The assistant 260 exemplifies each of the assistant 175 on the work client 110 and the assistant 180 on the home client 115. The PIM 255 may be stored in data storage 230, and loaded into internal storage 235 (as illustrated) for execution by the processor 205.

One skilled in the art will recognize that the system 100 may also include additional information, such as network connections, additional memory, additional processors, LANs, input/output lines for transferring information across a hardware channel, the Internet or an intranet, etc. One skilled in the art will also recognize that the programs and data may be received by and stored in the system 100 in alternative ways. For example, a computer-readable storage medium (CRSM) reader 265 such as a magnetic disk drive, hard disk drive, magneto-optical reader, CPU, etc. may be coupled to the signal bus 210 for reading a computer-readable storage medium (CRSM) 270 such as a magnetic disk, a hard

disk, a magneto-optical disk, RAM, etc. Accordingly, the system 100 may receive programs and data via the CRSM reader 265.

FIG. 3 is a block diagram illustrating details of the global server 105. The global server 105 includes a processor 305, such as an Intel Pentium® microprocessor or a Motorola Power PC® microprocessor, coupled to a communications channel 310. The global server 105 further includes an input device 315 such as a keyboard and mouse, an output device 320 such as a CRT display, data storage 325 such as a magnetic disk, and internal storage 330 such as RAM, each coupled to the communications channel 310. A communications interface 325 couples the communications channel 310 to the computer network 125.

An operating system 340 controls processing by processor 305, and is typically stored in data storage 330 and loaded into internal storage 335 (as illustrated) for execution. The synchronization agent 130, which cooperates with the base system 250 (FIG. 2) for synchronizing local workspace data 245 with workspace data 135, also may be stored in data storage 330 and loaded into internal storage 335 (as illustrated) for execution by processor 305. The workspace data 135 may be stored in data storage 230.

One skilled in the art will recognize that the system 100 may also include additional information, such as network connections, additional memory, additional processors, LANs, input/output lines for transferring information across

a hardware channel, the Internet or an intranet, etc. One skilled in the art will also recognize that the programs and data may be received by and stored in the system 100 in alternative ways. For example, a CRSM reader 345 such as a magnetic disk drive, hard disk drive, magneto-optical reader, CPU, etc. may be coupled to the
5 signal bus 310 for reading a CRSM 350 such as a magnetic disk, a hard disk, a magneto-optical disk, RAM, etc. Accordingly, the system 100 may receive programs and data via the CRSM reader 345.

FIG. 4 is a block diagram illustrating details of the remote client 120. The client 120 includes a processor 405, such as an Intel Pentium® microprocessor or a
10 Motorola Power PC® microprocessor, coupled to a communications channel 410. The client 120 further includes an input device 415 such as a keyboard and mouse, an output device 420 such as a CRT display, data storage 425 such as a magnetic disk, and internal storage 430 such as RAM, each coupled to the communications channel 410. A communications interface 425 couples the communications
15 channel 410 to the computer network 125.

An operating system 440 controls processing by processor 405, and is typically stored in data storage 430 and loaded into internal storage 435 (as illustrated) for execution. The PIM 170 and assistant 185 may be stored in data storage 430, and loaded into internal storage 435 (as illustrated) for execution by
20 the processor 405.

One skilled in the art will recognize that the system 100 may also include additional information, such as network connections, additional memory, additional processors, LANs, input/output lines for transferring information across a hardware channel, the Internet or an intranet, etc. One skilled in the art will also
5 recognize that the programs and data may be received by and stored in the system 100 in alternative ways. For example, a CRSM reader 445 such as a magnetic disk drive, hard disk drive, magneto-optical reader, CPU, etc. may be coupled to the signal bus 310 for reading a CRSM 450 such as a magnetic disk, a hard disk, a magneto-optical disk, RAM, etc. Accordingly, the system 100 may receive
10 programs and data via the CRSM reader 445.

FIG. 5 is a block diagram illustrating a PIM interface 500, which includes a header 505 and a selection window 510.

The header 505 includes a synchronize button 540 and a "borrow me" button 545, which are presented by the assistant 175, 180 or 185 incorporated in
15 the PIM 160, 165 or 170. Invoking the synchronize button 540 causes the assistant 175, 180 or 185 to enable synchronization of data entered into the PIM 160, 165 or 170 with the workspace data 135 on the global server 135. The synchronize button 540 may enable the user to configure a preference file that indicates when
20 automatic synchronization is to initiate and may also enable a user to effect manual synchronization.

The “borrow me” button 545 enables a user to use a PIM 160, 165 or 170 for viewing and manipulating workspace data 135 downloaded from the global server 105. That is, invoking the “borrow me” button 545 causes the corresponding assistant 175, 180 or 185 to communicate with the global server 105, to provide user identification and authentication information to the global server 105, to download workspace data 135 from the global server 105, to display and enable manipulation of the downloaded data 135 using the PIM interface 500, and to synchronize the manipulated downloaded data 135 upon logout. Since the PIM interface 500 is provided by the pre-existing PIM, the assistant 175, 180 or 185 need not provide its own data interface. Only a single interface is needed.

It will be appreciated that upon logout, the base systems 140 and 150 will cooperate with the synchronization agent 130 to synchronize automatically the workspace data 135 on the global server 105 with the workspace data 145 and 155. Accordingly, the user always has access to the most updated versions of workspace data from any site that executes a PIM 160, 165 or 170 having an assistant 175, 180 or 185 embodied therein.

It will be appreciated that the synchronize button 540 is most helpful to the work client 110 and the home client 115, since typically the work client 110 and home client 115 will set the preference file to configure automatic synchronization. Synchronization of the manipulated workspace data 135 at the remote client 120 will most often be effected through the automatic logout procedures of the “borrow

7. Accordingly, the borrow me button 545 is most helpful to the remote client 120.

FIG. 6 illustrates an example e-mail workspace element set user interface 600 (commonly referred to as the “In-Box”) for displaying received e-mails. The user interface 600 includes a header 605, an e-mail list window 610 and a manipulation command window 650.

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column 615 which provides the origin of each e-mail, a subject column 620 which provides the subject of each e-mail, and a date column 625 which provides the date each e-mail was received. The e-mail list window 610 may display e-mails stored in a local e-mail database (not shown), e-mails stored in the e-mail server (not shown) or e-mails downloaded from the global server 105. The e-mails shown include a first e-mail from Joe Smith, a second e-mail from Tom Jones, and a third e-mail from Roy White. If the user depressed the "borrow me" button 545 shown in FIG. 5, then the e-mail list displayed would be the e-mails stored and downloaded from the global server 105.

10 The manipulation window 650 includes available functions such as the conventional e-mail read function 630, e-mail reply function 635, e-mail forward function 640 and new e-mail write function 645. It will be appreciated that the columns and functions will vary based on the PIM.

FIG. 7 is a block diagram illustrating details of a generic assistant 700, which exemplifies each of the assistant 175, 180 and 185. The generic assistant 700 includes a communications module 705, locator modules 710, a general synchronization module 715, a content-based synchronization module 720, a security module 725, an instantiator 730, a data reader 735, a PIM Application Program Interface (API) 740 and a de-instantiator 745. The synchronization function of the assistant 700 uses the communications module 705, the locator modules 710, the general synchronization module 715, the content-based

synchronization module 720, the security module 725 and the PIM API 740. The “borrow me” function of the assistant 700 uses the communications module 705, the locator modules 710, the security module 725, the instantiator 730, the data reader 735, the PIM API 740 and the de-instantiator 745.

5 The communications module 705 includes routines for compressing and decompressing data, and routines for communicating with the synchronization agent 130. The communications module 705 may apply Secure Socket Layer (SSL) technology to establish a secure communication channel. Examples of communications modules 705 may include TCP/IP stacks or the AppleTalk
10 protocol.

 The locator modules 710 include routines for identifying the memory locations of the workspace elements in the workspace data 135. Workspace element memory location identification may be implemented using intelligent software, i.e., preset memory addresses or the system’s registry, or using dialogue
15 boxes to query the user. Accordingly, the locator modules 710 determine the memory addresses of the workspace elements in e-mail workspace data 135, in file workspace data 135, in calendar workspace data 135, etc.

 The general synchronization module 715 examines the workspace data 135 on the global server 105 to determine whether it had been modified while the user
20 manipulated the data on the client 110, 115 or 120. Further, the general synchronization module 715 determines whether the user manipulated any data on

the client 110, 115 or 120. If the general synchronization module 715 determines that only the data on the client 110, 115 or 120 was manipulated, then the general synchronization module 715 computes and sends the changes to the synchronization agent 130 of the global server 105. The general synchronization module 715 is initiated when the synchronization button 540 is depressed and during the logout procedures of the “borrow me” function.

The synchronization agent 130 then updates a last synchronization signature to indicate to all base systems 140 and 150 that synchronization with workspace data 145 and synchronization with workspace data 155 are needed. If the general synchronization module 715 determines that changes were made only to the workspace data 135 on the global server 105, then the general synchronization module 715 instructs the synchronization agent 130 to compute and transmit the changes made to the client 110, 115 or 120 at the client’s request. The client 110 or 120 then updates its information. It will be appreciated that sending only the changes reduces processor load and increases transmission line efficiency, although alternatively an entire manipulated workspace element can be sent to the global server 105.

If the general synchronization module 715 determines that the workspace data 135 on the global server 105 has been modified since download, and that the data on the client 110, 115 or 120 has been modified, then the general synchronization module 715 instructs the content-based synchronization module

720 to perform its duties. The content-based synchronization module 720 includes routines for reconciling two or more modified versions of a workspace element.

The content-based synchronization module 720 may request a user to select the preferred one of the modified versions or may respond based on preset

- 5 preferences, i.e., by storing both versions in both stores or by integrating the changes into a single preferred version which replaces each modified version at both stores.

The security module 725 includes routines for obtaining user identification and authentication using such techniques as obtaining login and password

- 10 information, obtaining a response to a challenge, obtaining a public key certificate, etc. The security module 725 performs identification and authentication techniques to confirm authorization by the user to access the workspace data 135 stored on the global server 105. It will be appreciated that authorization may be granted only to portion of the workspace data 135 that belongs to the user.

- 15 The instantiator 730 is an application program interface 730 that creates a window for displaying and enabling manipulation of the workspace data 135 downloaded from the global server 105. In an object-oriented environment, the instantiator 730 may create a new instance for the workspace data 135.

Alternatively, the instantiator 730 may store the local data to a buffer (not shown)

- 20 and use the current interface to display and enable manipulation of the workspace data 135.

The data reader 735 communicates with the synchronization agent 130 at the global server 105, and retrieves the workspace data 135 requested. For example, if the user depresses the “borrow me” button 545 (FIG. 5) and depresses the e-mail button 515, then the data reader 735 retrieves the e-mail workspace
 5 elements of the workspace data 135, and delivers them to the PIM API 740.

The PIM API 740 translates and transfers the workspace data 135 received from the global server 105 to the PIM 160, 165 or 170 for display and enabling manipulation thereto. The PIM API 740 further translates and transfers the workspace data manipulated on the client 110, 115 or 120 from the PIM 160, 165
 10 or 170 back to the global server 105.

The de-instantiator 745 returns the PIM 160, 165 or 170 to the state before the user selected the “borrow me” button 545. The user may initiate operations of the de-instantiator 745 by depressing an “unborrow me” button (not shown) that is presented after selection of the “borrow me” button 545. The de-instantiator 745
 15 deletes any instance created by the instantiator 730, deletes all workspace data 135 and data created by the user on the client 110, 115 or 120 and automatically initiated synchronization of any manipulated downloaded data 135 with the workspace data 135 stored at the global server 105.

Operations of the instantiator 730, the data reader 735, the PIM API 740
 20 and the de-instantiator 745 are described in greater detail with reference to the following examples:

Action

Local Data

standby	_____	local data \rightarrow pst ^{local}
button depressed	_____	pst ^{local}
enter login/password	_____	pst ^{local}
authenticate	_____	pst ^{local}
send global data	global data \rightarrow pst ^{local}	local data \rightarrow pst buffer
manipulate data	global data \rightarrow global data 2	pst ^{buffer}
logout	1) Compute Δ global data 2) Synchronize Δ global data with global server 3) Delete global data 2 4)	local data \rightarrow pst ^{local}

As illustrated by the OutlookTM example above, during standby, the PIM 160, 165 or 170 stores the local data on the client 110, 115 or 120 in a personal folder store pst^{local}. The user then depresses the “borrow me” button 545. The security module 725 requests the user to enter a login and password, which the

global server 105 authenticates. During these steps, it will be appreciated that the local data remains stored in pst^{local} . Upon user identification and authentication, the global server 105 sends the workspace data 135 (global data) to the requesting client 110, 115 or 120. The instantiator 730 on the client 110, 115 or 120 transfers
5 the local data from pst^{local} to a buffer pst^{buffer} , and stores the received global data into pst^{local} . The data reader 745 and PIM API 740 enable the user to manipulate the global data, the manipulated data being referred to herein as “global data 2.” Upon logout, for example, after an “unborrow me” button (not shown) is depressed, the global data 2 is synchronized with the workspace data
10 135. Namely, the general synchronization module 715 determines the changes made (Δ global data), and synchronizes Δ global data with the workspace data 135. The de-instantiator 745 deletes global data 2 and Δ global data, and returns the local data to pst^{local} .

<u>Action</u>	<u>Global Data</u>	<u>Local Data</u>
standby	—	local.org
button	—	local.org
enter login/password	—	local.org
authenticate	new instance	local.org
send global data	open with global.org	local.org
manipulate data	global.org \rightarrow global.org ²	local.org
logout	1) compute Δ global.org 2) Synchronize Δ global.org with global server 3) delete global.org ²	local.org

5 local.org. The user then depresses the “borrow me” button 545. The security module 725 requests the user to enter a login and password, which the global server 105 authenticates. During these steps, it will be appreciated that the local data remains stored in local.org. Upon user identification and authentication, the

global server 105 sends the workspace data 135 (global data) to the requesting client 110, 115 or 120. The instantiator 730 on the client 110, 115 or 120 creates a new instance, e.g., a new window, of PIM API 740 and stores the received global data into another file, i.e., global.org. The data reader 745 and PIM API 740

5 enable the user to manipulate the global data, the manipulated data being referred to herein as “global data 2.” Upon logout, the global data 2 is synchronized with the workspace data 135. Namely, the general synchronization module 715 determines the changes made (Δ global data), and synchronizes Δ global data with the workspace data 135. The de-instantiator 745 deletes global data 2, Δ global

10 data and global.org.

FIG. 8 is a flowchart illustrating a method 800 of accessing data remotely in accordance with the present invention. The method 800 begins with the processor 405 in step 805 opening the PIM 160, 165 or 170 per user request, and the PIM 160, 165 or 170 opening a PIM interface 500 (FIG. 5). The PIM 160, 165 or 170

15 in step 810 receives a “borrow me” request from the user, i.e., the user depresses the “borrow me” button 545. The PIM API 740 in step 815 recognizes the request, and instructs the communications module 705 to create a communications link with the global server 105.

The security module 725 in step 820 requests and transmits identification and authentication information such as login and password information from the

20 user to the global server 105 for examination. If the global server 105 fails to

identify or authenticate the user, then the method 800 ends. Otherwise, the instantiator 730 in step 825 opens a PIM interface 500 to display and enable manipulation of the workspace data 135 downloaded from the global server 105.

The data reader 735 in step 830 reads the workspace data 135 downloaded from the global server 105, and in step 835 translates the data to the appropriate format if necessary. That is, the data reader 735 translates the workspace data 135 from the format implemented by the global server 105 to the format implemented by the PIM 160, 165 or 170. The PIM API 740 in step 840 passes the translated workspace data 135 to the PIM interfaces 500 and 600.

10 The PIM 160, 165 or 170 enables the user in step 845 to manipulate the workspace data 135 as necessary. Manipulation includes adding new data, deleting workspace data 135, editing workspace data 135, etc. For example, the user can depress the e-mail button 515 in interface 500 to select, review and manipulate e-mail in interface 600, and then can depress the calendar button 530 in interface 500 to select, review and manipulate calendar information (not shown) in an interface similar to the e-mail interface 600. In step 850, the PIM API 740 waits to receive an “end session” request. Until an “end session” request is received, the method 800 returns to step 830 to enable continued data review and manipulation.

20 Upon receiving an “end session” or “unborrow me” request, the de-instantiator 745 initiates the general synchronization module 715 in step 855 to

synchronize the manipulated workspace data on the client 110, 115 or 120 with the workspace data 135 on the global server 105, if required. Synchronization is described in greater detail with reference to FIG. 9. The de-instantiator 745 in step 860 deletes the workspace data on the client 110, 115 or 120, and deletes all
5 records of the matter. Method 800 then ends.

FIG. 9 is a flowchart illustrating a method 900 for synchronizing workspace data in a computer network 100. Method 900 begins with the communications module 705 in step 905 establishing a communications link with the synchronization agent 130 of the global server 105. The locator modules 710 in
10 step 910 identify the memory locations of the workspace elements in the workspace data 135. It will be appreciated that workspace element memory location identification may be implemented using intelligent software or dialogue boxes.

The general synchronization module 715 in step 915 compares version
15 information (not shown) for each workspace element in the workspace data (on the client 110, 115 or 120 and on the global server 105) against a last synchronization signature to determine which workspace elements have been modified. In this embodiment, a workspace element may have been modified if the date and time of the last modification is after the date and time of the downloading.

20 If the general synchronization module 715 locates no modified workspace elements in the workspace data on the client 110, 115 or 120, then the method 900

ends. Otherwise, the general synchronization module in step 920 determines whether the version of the same workspace element of the workspace data 135 on the global server 105 has been modified since the data 135 was downloaded.

If only the version on the client 110, 115 or 120 has been modified, then the
5 general synchronization module 715 in step 925 stores the updated version of the workspace element at the global server 105. To store the updated version on the global server 105, the general synchronization module 715 may compute the changes made and forward the changes to the synchronization agent 130. The synchronization agent 130 enters the changes into the global server 105 version.
10 The general synchronization module 715 in step 930 determines whether all workspace elements downloaded to the client 110, 115 or 120 have been examined. If not, then method 900 returns to step 915. Otherwise, the synchronization agent 130 in step 935 updates the last synchronization signature, and method 900 ends. Updating the last synchronization signature will instruct the
15 base systems 140 and 150 to synchronize the workspace data 145 and 155 with the workspace data 135 on the global server 105, as described in the patent applications incorporated by reference above.

If the general synchronization module 715 in step 920 determines that both the version on the client 110, 115 or 120 and the version on the global server 105
20 have been modified, then the general synchronization module in step 935 instructs the content-based synchronization module 729 to reconcile the modified versions.

Reconciliation may include requesting instructions from the user, or performing based on pre-selected preferences responsive actions such as storing both versions at the global server 105. The general synchronization module 715 in step 940 stores the preferred version on the global server 105. Method 900 then proceeds to
5 step 930.

The foregoing description of the preferred embodiments of the present invention is by way of example only, and other variations and modifications of the above-described embodiments and methods are possible in light of the foregoing teaching. Although the network sites are being described as separate and distinct
10 sites, one skilled in the art will recognize that these sites may be a part of an integral site, may each include portions of multiple sites, or may include combinations of single and multiple sites. Further, components of this invention may be implemented using a programmed general purpose digital computer, using application specific integrated circuits, or using a network of interconnected
15 conventional components and circuits. Connections may be wired, wireless, modem, etc. The embodiments described herein are not intended to be exhaustive or limiting. The present invention is limited only by the following claims.

WHAT IS CLAIMED IS:

- 1 1. A computer-based method, comprising the steps of:
2 downloading data from a remote site;
3 requesting a workspace data manager to enable manipulation of the data
4 and thereby create manipulated data; and
5 synchronizing the manipulated data with the data stored at the remote site.
- 1 2. The method of claim 1, further comprising the step of requesting the
2 workspace data manager to provide an interface for enabling manipulation of the
3 data.
- 1 3. The method of claim 2, further comprising the step of using the workspace
2 data manager interface to request synchronization.
- 1 4. The method of claim 2, wherein the workspace data manager provides an
2 interface by creating an instance.
- 1 5. The method of claim 2, wherein the workspace data manager provides an
2 interface by providing access to its only interface.

1 6. The method of claim 1, further comprising the step of translating the
2 workspace data from the format used by the remote site and the format used by the
3 workspace data manager.

1 7. The method of claim 1, further comprising the step of deleting the
2 workspace data manager interface after manipulation of data is no longer needed.

1 8. The method of claim 1, wherein the data stored at the remote site has not
2 changed and therefore includes the downloaded data.

1 9. The method of claim 1, wherein the data stored at the remote site has been
2 modified, and therefore is different than the downloaded data.

1 19. The system of claim 18, further comprising a content-based synchronization
2 module for synchronizing the data stored at the remote site with the manipulated
3 data.

1 20. A system comprising:
2 means for downloading data from a remote site;
3 means for requesting a workspace data manager to enable manipulation of
4 the data and thereby create manipulated data; and
5 means for synchronizing the manipulated data with the data stored at the
6 remote site.

1 21. A computer-readable storage medium storing program code for causing a
2 computer to perform the steps of:
3 downloading data from a remote site;
4 requesting a workspace data manager to enable manipulation of the data
5 and thereby create manipulated data; and
6 synchronizing the manipulated data with the data stored at the remote site.

ABSTRACT OF THE DISCLOSURE

5

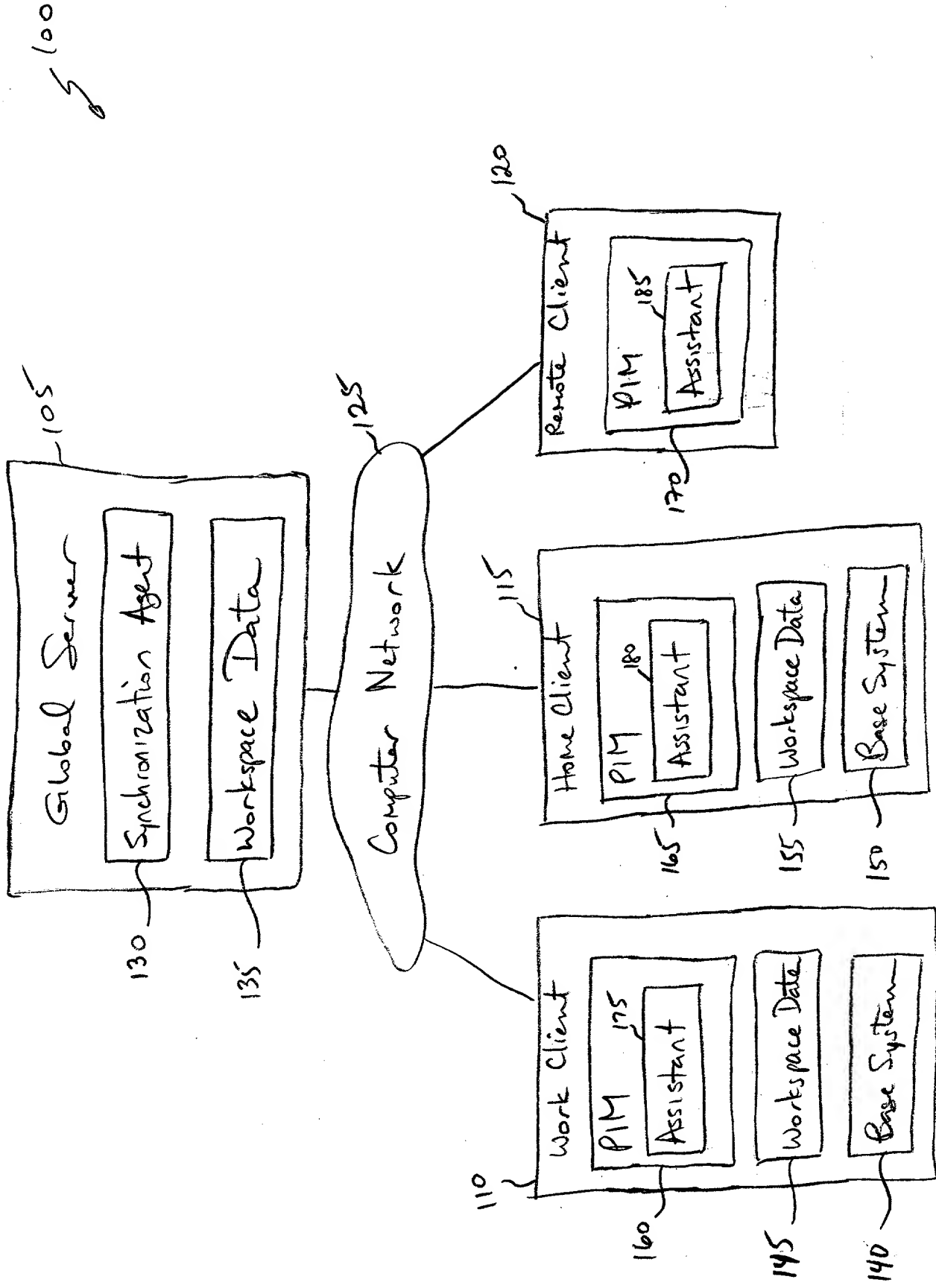


FIG. 1 (Network System)

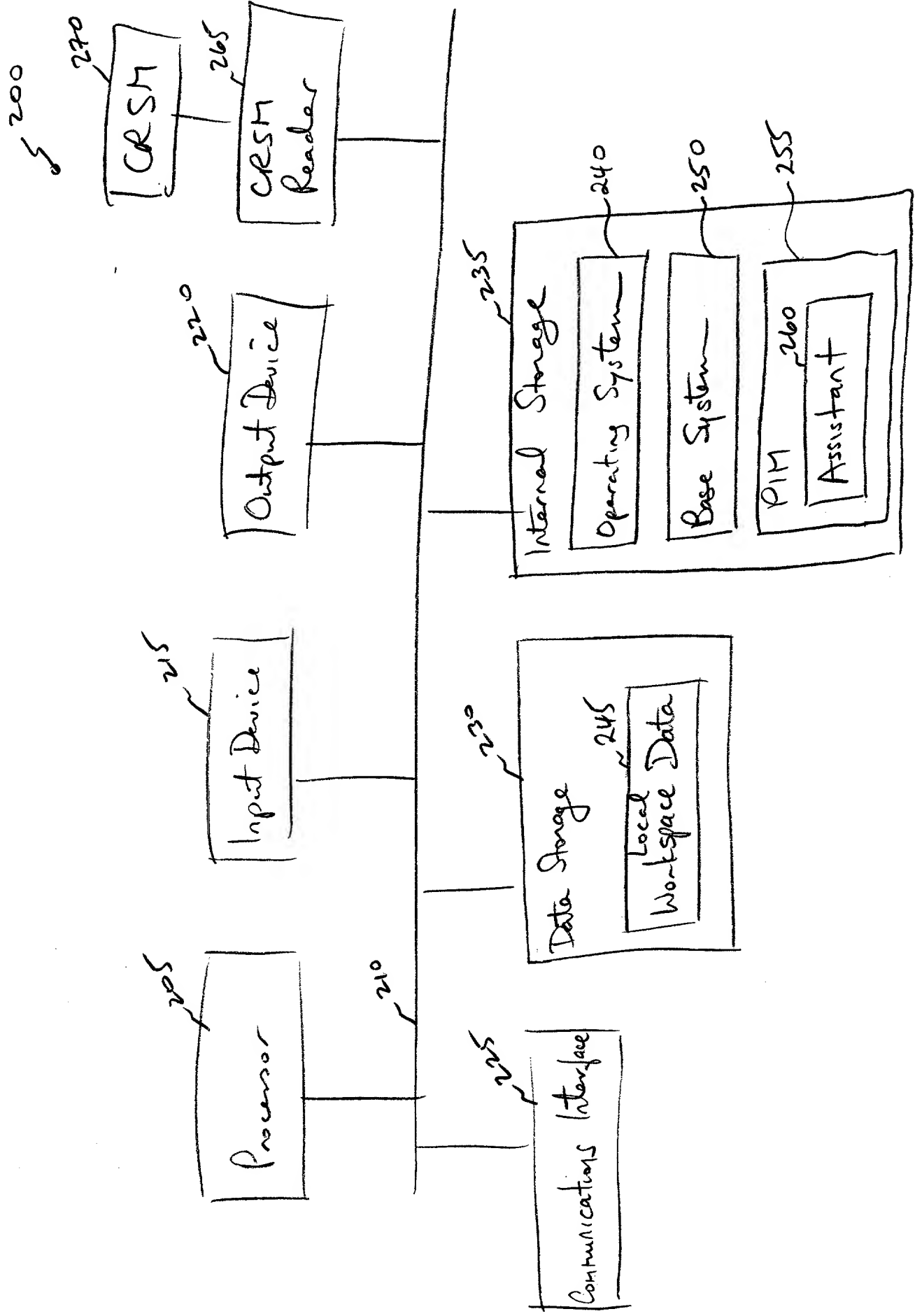


FIG. 2 (Home/work client)

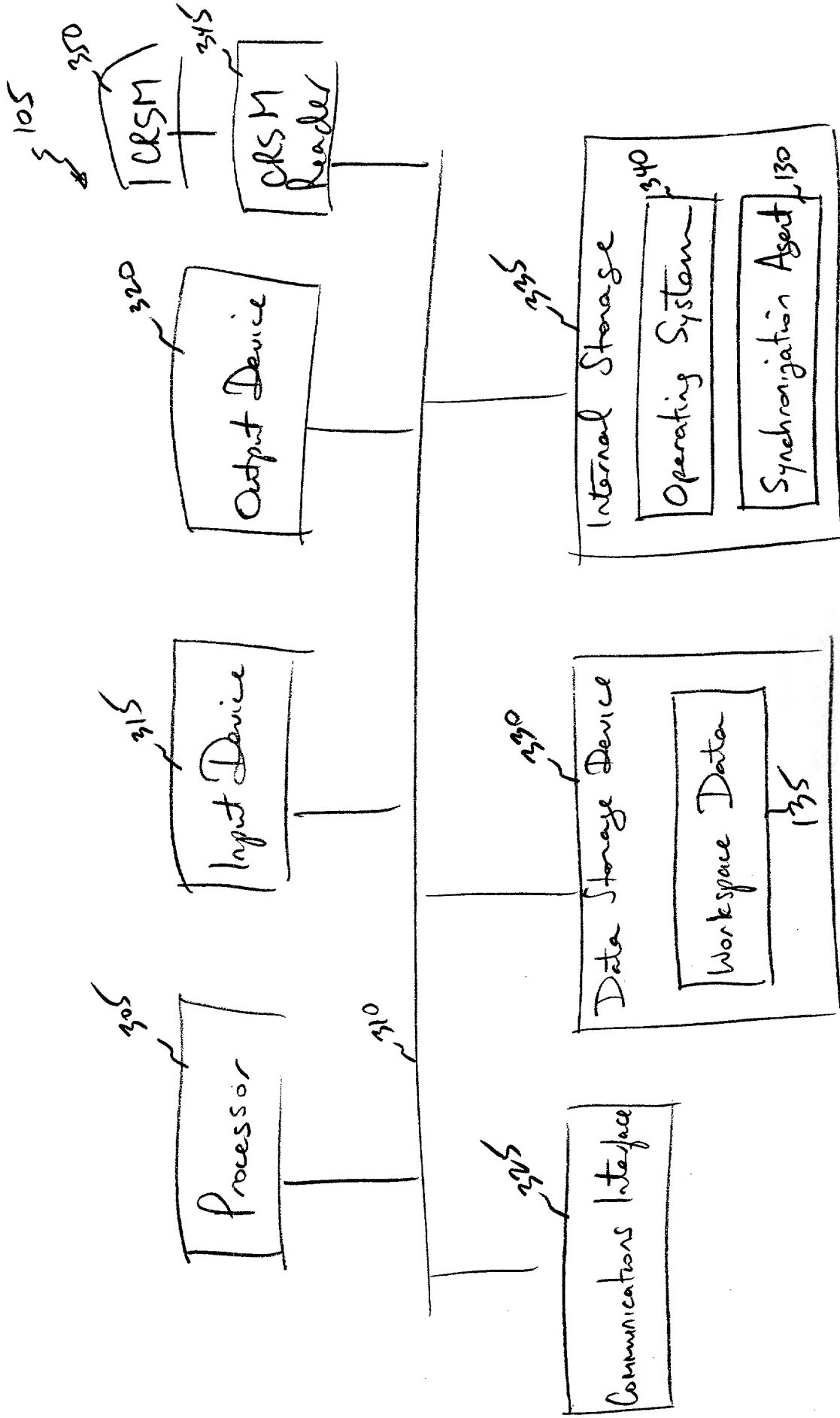


FIG. 3 (Global Server)

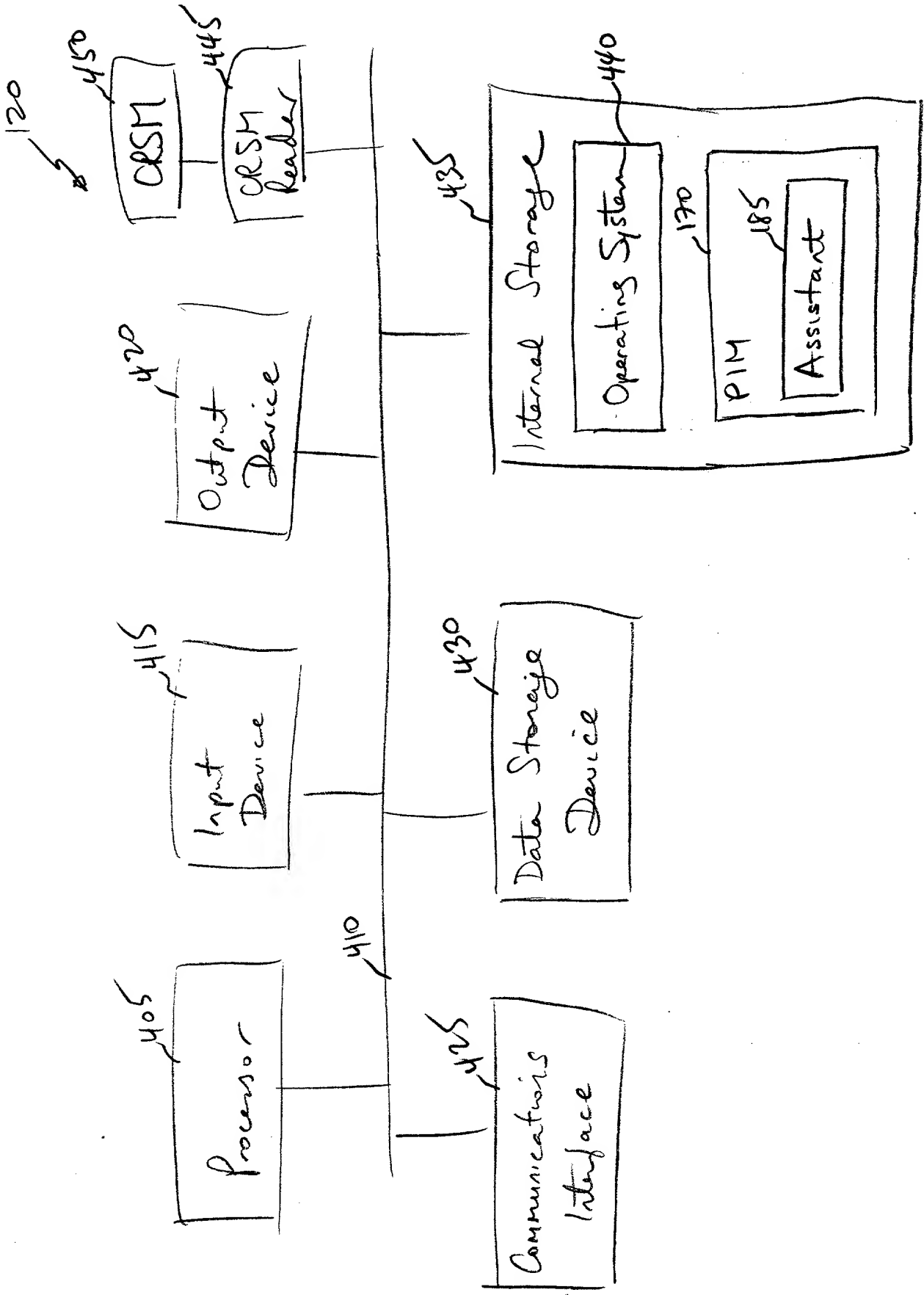


FIG. 4 (Remote Client)

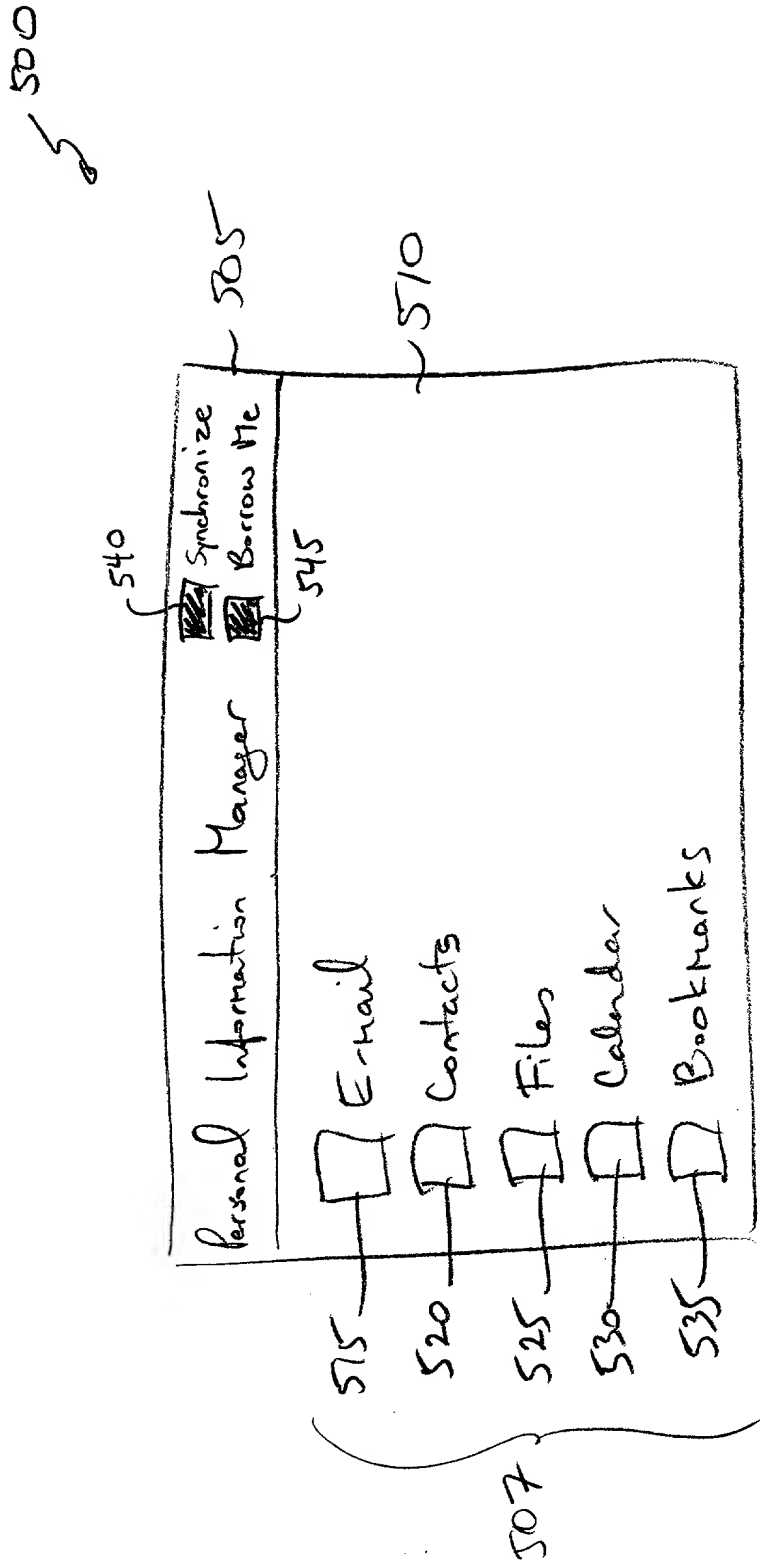


FIG. 5

600

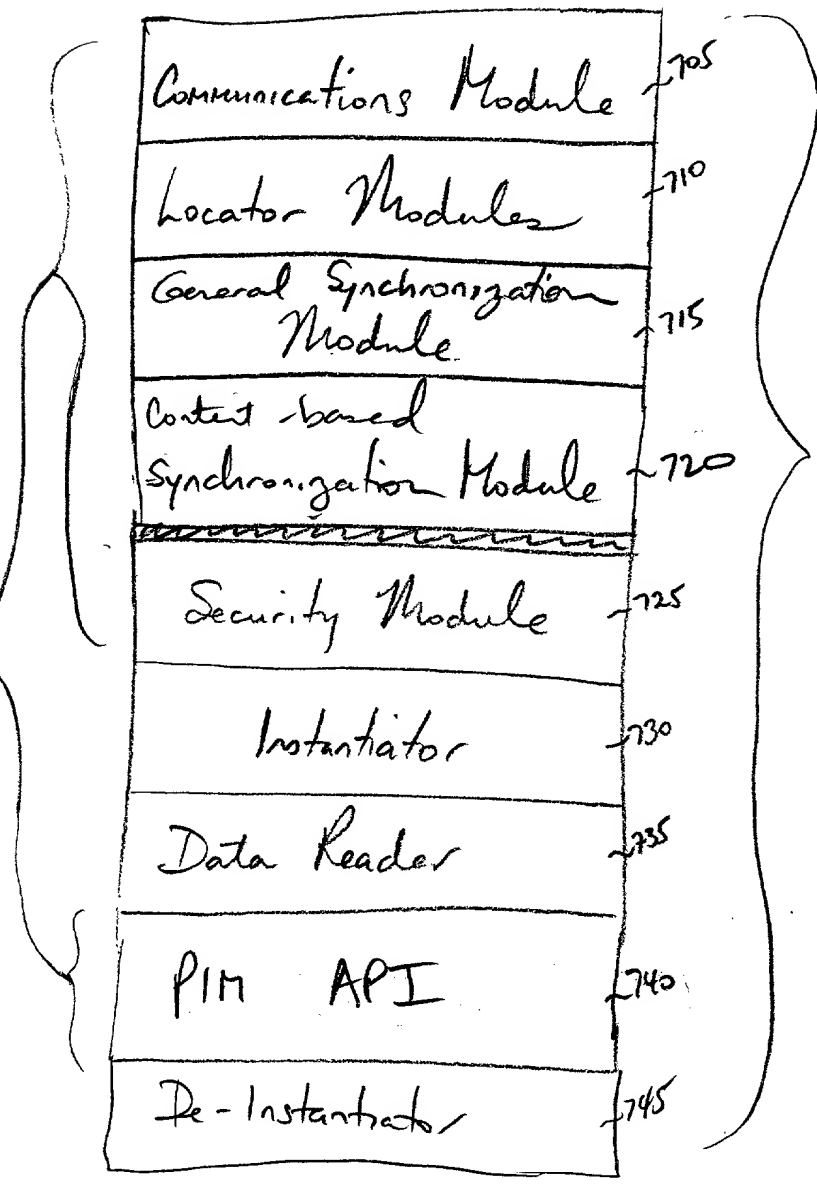


954

700

09008331-011598

(Synchronizing)



(Borrow the)

FIG. 7 (Assistant)

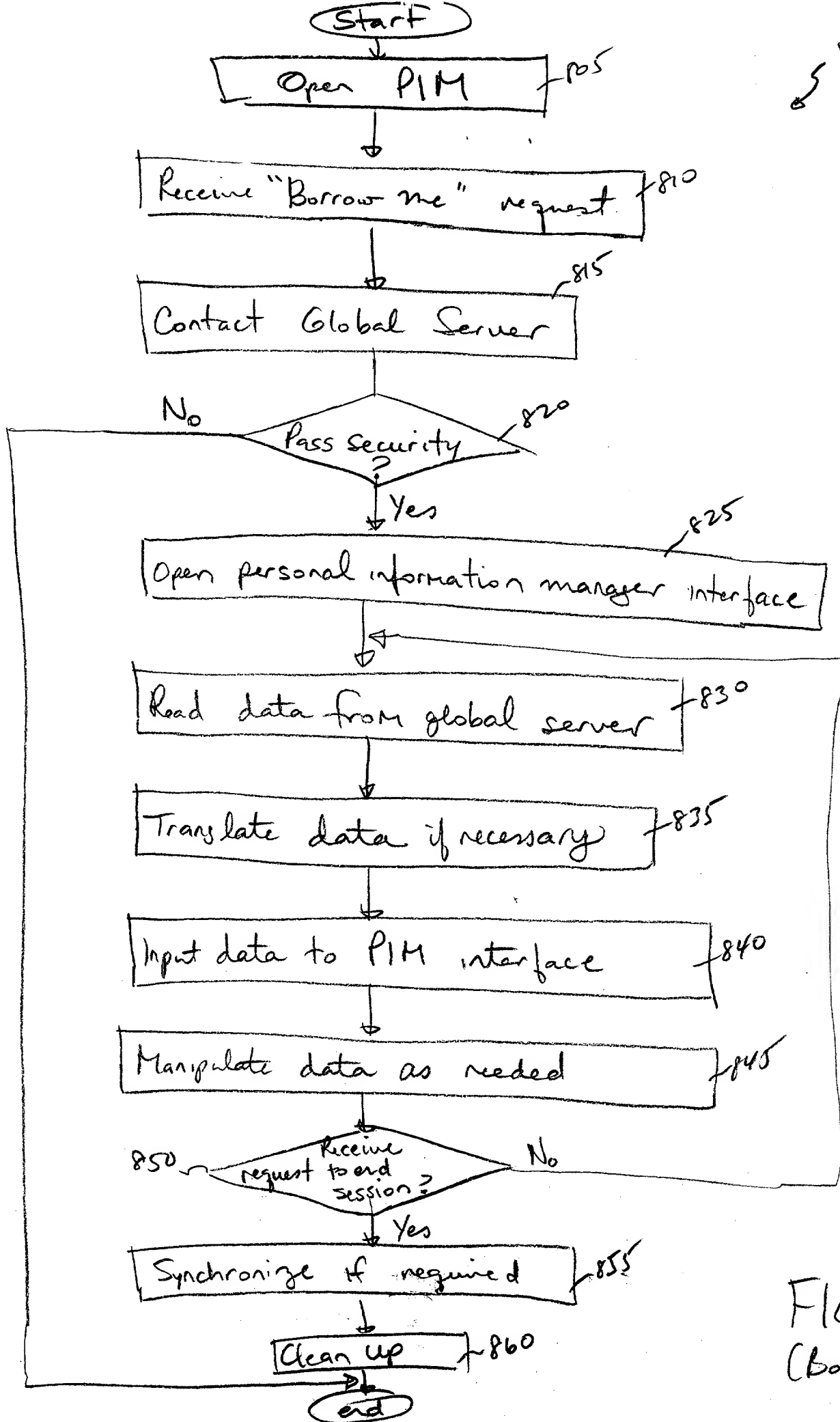


FIG. 8
(Borrow Me)

00008354-011598

900

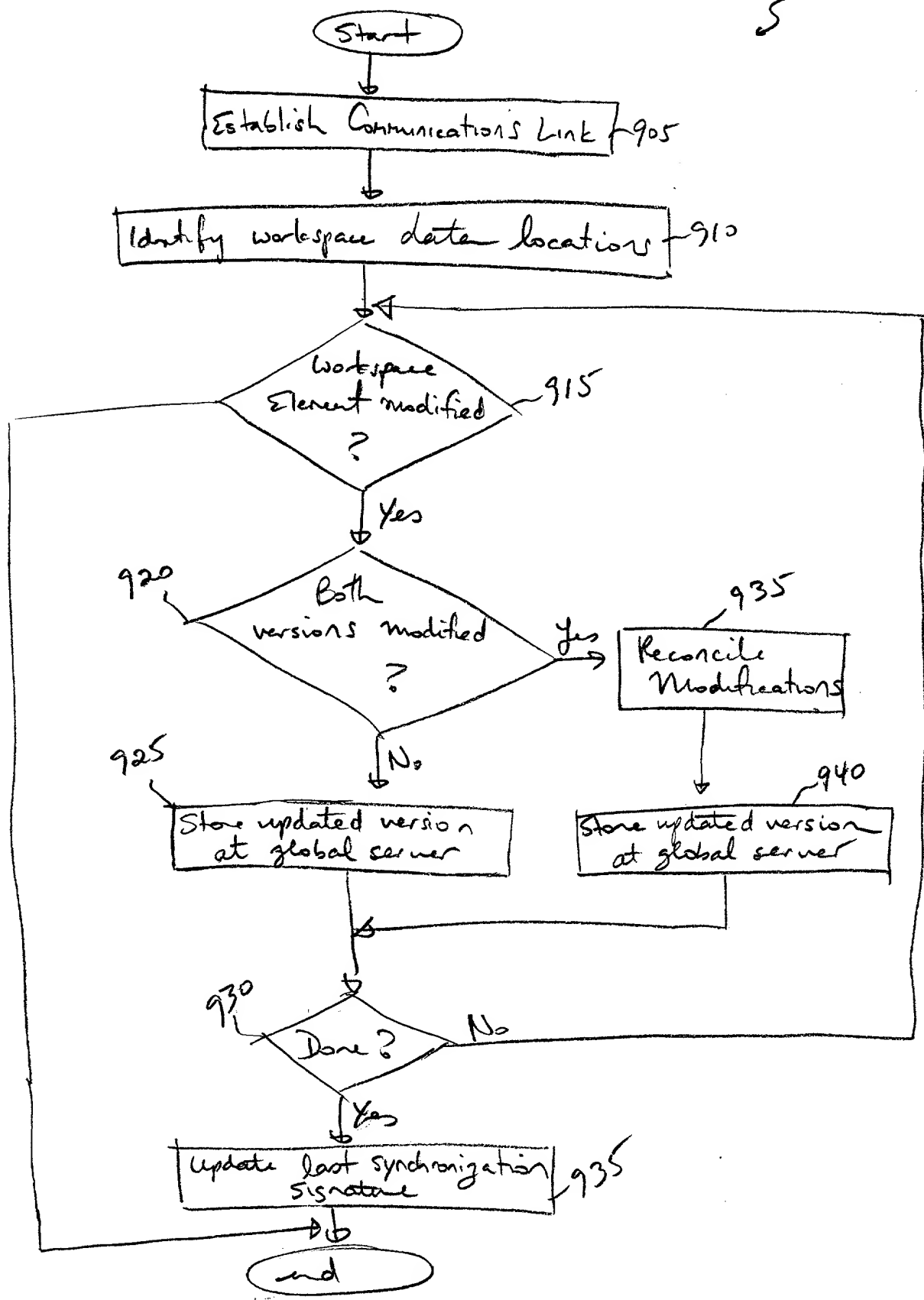


FIG. 9

COMBINED DECLARATION FOR PATENT APPLICATION & POWER OF ATTORNEY

DOCKET NO.: 40827.00002

As a below named inventor, I hereby declare that:

The information given herein is true;

My residence, post office address and citizenship are as stated below next to my name;

I BELIEVE I AM THE ORIGINAL, FIRST AND SOLE INVENTOR (if only one name is listed below) OR AN ORIGINAL, FIRST AND JOINT INVENTOR (if plural names are listed below) OF THE SUBJECT MATTER WHICH IS CLAIMED AND FOR WHICH A PATENT IS SOUGHT ON THE INVENTION ENTITLED:

"SYSTEM AND METHOD FOR USING A WORKSPACE DATA MANAGER TO ACCESS, MANIPULATE AND SYNCHRONIZE NETWORK DATA"

the specification of which (check only one item below):

- ☒ is attached hereto;
- ☐ was filed on _____ as United States
Application Serial No. _____
and was amended on _____ (if applicable).
- ☐ was filed on _____ as PCT International
Application Serial No. _____
and was amended under PCT Article 19 _____ (if applicable).

I hereby state that I have reviewed and understand the content of the above-identified specification, including the claims, as amended by any amendment referred to above.

I acknowledge the duty to disclose information which is material to the examination of this application in accordance with Title 37, Code of Federal Regulations Section 1.56(a).

I hereby claim the benefit under Title 35, United States, §119(e) of any United States provisional application(s) listed below.

(Application Number)

(Filing Date)

I hereby claim foreign priority benefits under Title 35, United States Code, Section 119 of any foreign application(s) for patent or inventor's certificate or any PCT international application(s) designating at least one country other than the United States of America listed below and have also identified below any foreign application(s) for patent or inventor's certificate or any PCT international application(s) designating at least one country other than the United States of America having a filing date before that of the application(s) on which priority is claimed.

FOREIGN APPLICATION(S), IF ANY, FILED WITHIN 12 (6 if a Design) MONTHS PRIOR TO THE FILING DATE OF THIS APPLICATION THE PRIORITY OF WHICH WHERE PERMITTED IS HEREBY CLAIMED UNDER 35 U.S.C. SEC. 119.

COUNTRY	APPLICATION OF NUMBER	DATE OF FILING (day, month, year)	DATE OF ISSUE (day, month, year)	PRIORITY CLAIMED	
				<input type="checkbox"/> yes	
				<input type="checkbox"/> yes	

I hereby claim the benefit under Title 35, United States Code, Section 120 of any United States application(s) or PCT international application(s) designating the United States of America that is/are listed below and, insofar as the subject matter of each of the claims of this application is not disclosed in that/those prior application(s) in the manner provided by the first paragraph of Title 35, United States Code, Section 112, I acknowledge the duty to disclose material information as defined in Title 37, Code of Federal Regulations, Section 1.56(a) which occurred between the filing date of the prior application(s) and the national or PCT international filing date of this application.

COMBINED DECLARATION FOR PATENT APPLICATION & POWER OF ATTORNEY - Continued				ATTORNEY'S DOCKET NO: 40827.00002	
U.S. APPLICATION NO.		U.S. FILING DATE		PATENTED	PENDING
08/766,307		December 13, 1996			
08/841,950		April 8, 1997			
08/865,075		May 29, 1997			
08/835,997		April 11, 1997			
08/897,888		July 22, 1997			
08/899,277		July 23, 1997			
08/903,118		July 30, 1997			
<p>POWER OF ATTORNEY: As a named inventor, I hereby appoint the following attorney(s) and/or Agent(s) to prosecute this application and transact all business in the Patent and Trademark Office connected therewith.</p> <p>David L. Fehrman, Reg. No. 28,600; David L. Henty, Reg. No. 31,323; William J. Robinson, Reg. No. 29,430; Stuart L. Merkadeau, Reg. No. 33,262; David B. Abel Reg. No. 32,394; Hisako Muramatsu, Reg. No. 34,955; Brian M. Berliner, Reg. No. 34,549; David J. Meyer, Reg. No. 33,425; Lawrence W. Granatelli, Reg. No. 32,228; Vincent J. Belusko, Reg. No. 30,820; Minda Schechter, Reg. No. 38,296; E. Russell Tarleton, Reg. No. 31,800; Laura A. Majerus, Reg. No. 33,417; Joseph K. Hollinger Reg. No. 40,649; Jonathan T. Kaplan Reg. No. 38,935; Marc A. Sockol Reg. No. 40,823 ; Ian Cartier Reg. No. 38,406; Linda Beach Reg. No. 36,446.</p>					
Send correspondence to		GRAHAM & JAMES LLP 600 Hansen Way Palo Alto, CA 94304-1043		Direct Phone Calls To: Marc A. Sockol: 650-856-6500	
1	FULL NAME OF INVENTOR	LAST NAME Mendez	FIRST NAME Daniel		MIDDLE NAME J.
	RESIDENCE & CITIZENSHIP	CITY Menlo Park	STATE OR FOREIGN COUNTRY California		COUNTRY OF CITIZENSHIP US
	POST OFFICE ADDRESS	STREET 275 Gloria Circle	CITY Menlo Park	STATE OR COUNTRY CA	ZIP CODE 94025
2	FULL NAME OF INVENTOR	LAST NAME	FIRST NAME		MIDDLE NAME
	RESIDENCE & CITIZENSHIP	CITY	STATE OR FOREIGN COUNTRY		COUNTRY OF CITIZENSHIP
	POST OFFICE ADDRESS	STREET	CITY	STATE OR COUNTRY	ZIP CODE
3	FULL NAME OF INVENTOR	LAST NAME	FIRST NAME		MIDDLE NAME
	RESIDENCE & CITIZENSHIP	CITY	STATE OR FOREIGN COUNTRY		COUNTRY OF CITIZENSHIP
	POST OFFICE ADDRESS	STREET	CITY	STATE OR COUNTRY	ZIP CODE
<p>I further declare that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code, and that such willful false statements may jeopardize the validity of the application or any patent issuing thereon.</p>					
SIGNATURE OF INVENTOR 1		SIGNATURE OF INVENTOR 2		SIGNATURE OF INVENTOR 3	
DATE		DATE		DATE	

VERIFIED STATEMENT (DECLARATION) CLAIMING SMALL ENTITY STATUS (37 CFR 1.9(f) AND 1.27 (c)) - SMALL BUSINESS CONCERN			Docket No. 40827.00002
Serial No. Not assigned	Filing Date Not assigned	Patent No.	Issue Date
Applicant/ Patentee: Daniel J. Mendez			
Invention: SYSTEM AND METHOD FOR USING A WORKSPACE DATA MANAGER TO ACCESS, MANIPULATE AND SYNCHRONIZE NETWORK DATA			
<p>I hereby declare that I am:</p> <p><input type="checkbox"/> the owner of the small business concern identified below:</p> <p><input checked="" type="checkbox"/> an official of the small business concern empowered to act on behalf of the concern identified below:</p> <p>NAME OF CONCERN: <u>Visto Corporation</u></p> <p>ADDRESS OF CONCERN: <u>1937 Landings Drive, Mountain View, CA 94043</u></p> <p>I hereby declare that the above-identified small business concern qualifies as a small business concern as defined in 37 CFR 1.27(b), and reproduced in 37 CFR 1.9(d), for purposes of paying reduced fees under Section 41(a) and (b) of Title 35, United States Code, in that the number of employees of the concern, including those of its affiliates, does not exceed 500 persons. For purposes of this statement, (1) the number of employees of the business concern is the average over the previous fiscal year of the concern of the persons employed on a full-time, part-time or temporary basis during each of the pay periods of the fiscal year, and (2) concerns are affiliates of each other when either, directly or indirectly, one concern controls or has the power to control the other, or a third party or parties controls or has the power to control both.</p> <p>I hereby declare that rights under contract or law have been conveyed to and remain with the small business concern identified above with regard to the above identified invention described in:</p> <p><input checked="" type="checkbox"/> the specification filed herewith with title as listed above.</p> <p><input type="checkbox"/> the application identified above.</p> <p><input type="checkbox"/> the patent identified above.</p> <p>If the rights held by the above-identified small business concern are not exclusive, each individual, concern or organization having rights to the invention is listed on the next page and no rights to the invention are held by any person, other than the inventor, who could not qualify as an independent inventor under 37 CFR 1.9(c) or by any concern which would not qualify as a small business concern under 37 CFR 1.9(d) or a nonprofit organization under 37 CFR 1.9(e).</p>			

Each person, concern or organization to which I have assigned, granted, conveyed, or licensed or am under an obligation under contract or law to assign, grant, convey, or license any rights in the invention is listed below:

- ☒ no such person, concern or organization exists.
- ☐ each such person, concern or organization is listed below.

FULL NAME _____
ADDRESS _____

☐ Individual ☐ Small Business Concern ☐ Nonprofit Organization

FULL NAME _____
ADDRESS _____

☐ Individual ☐ Small Business Concern ☐ Nonprofit Organization

FULL NAME _____
ADDRESS _____

☐ Individual ☐ Small Business Concern ☒ Nonprofit Organization

FULL NAME _____
ADDRESS _____

☐ Individual ☐ Small Business Concern ☐ Nonprofit Organization

Separate verified statements are required from each named person, concern or organization having rights to the invention averring to their status as small entities. (37 CFR 1.27)

I acknowledge the duty to file, in this application or patent, notification of any change in status resulting in loss of entitlement to small entity status prior to paying, or at the time of paying, the earliest of the issue fee or any maintenance fee due after the date on which status as a small entity is no longer appropriate. (37 CFR 1.28(b))

I hereby declare that all statements made herein of my own knowledge are true and that all statements made on information and belief are believed to be true; and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under Section 1001 of Title 18 of the United States Code and that such willful false statements may jeopardize the validity of the application, any patent issuing thereon, or any patent to which this verified statement is directed.

NAME OF PERSON SIGNING. Hong O. Bui

TITLE OF PERSON SIGNING

OTHER THAN OWNER: Vice President

ADDRESS OF PERSON SIGNING: 1937 Landings Drive
Mountain View, CA 94043

SIGNATURE: DATE: January 16, 1998

Variable	Group 1 (%)	Group 2 (%)
1. Age	18, 22, 25, 28, 32, 35, 38, 42, 45, 48, 52, 55, 58, 62, 65, 68, 72, 75, 78, 82, 85, 88, 92, 95, 98, 100	15, 20, 23, 26, 30, 33, 36, 40, 43, 46, 50, 53, 56, 60, 63, 66, 70, 73, 76, 80, 83, 86, 89, 93, 96, 99, 100
2. Sex	45, 55, 65, 75, 85, 95	40, 50, 60, 70, 80, 90
3. Education	10, 20, 30, 40, 50, 60, 70, 80, 90, 100	12, 22, 32, 42, 52, 62, 72, 82, 92, 100
4. Income	10, 20, 30, 40, 50, 60, 70, 80, 90, 100	15, 25, 35, 45, 55, 65, 75, 85, 95, 100
5. Employment	10, 20, 30, 40, 50, 60, 70, 80, 90, 100	12, 22, 32, 42, 52, 62, 72, 82, 92, 100
6. Religion	10, 20, 30, 40, 50, 60, 70, 80, 90, 100	15, 25, 35, 45, 55, 65, 75, 85, 95, 100
7. Political Party	10, 20, 30, 40, 50, 60, 70, 80, 90, 100	12, 22, 32, 42, 52, 62, 72, 82, 92, 100
8. Marital Status	10, 20, 30, 40, 50, 60, 70, 80, 90, 100	15, 25, 35, 45, 55, 65, 75, 85, 95, 100
9. Number of Children	10, 20, 30, 40, 50, 60, 70, 80, 90, 100	12, 22, 32, 42, 52, 62, 72, 82, 92, 100
10. Number of Siblings	10, 20, 30, 40, 50, 60, 70, 80, 90, 100	15, 25, 35, 45, 55, 65, 75, 85, 95, 100
11. Number of Pets	10, 20, 30, 40, 50, 60, 70, 80, 90, 100	12, 22, 32, 42, 52, 62, 72, 82, 92, 100
12. Number of Vehicles	10, 20, 30, 40, 50, 60, 70, 80, 90, 100	15, 25, 35, 45, 55, 65, 75, 85, 95, 100